



Global 3000 Service Pack Note DL Account Defaults.

Author	DCP	
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INTRODUCTION

This service pack provides the ability to default the account type and balance method.

The 'New Customer Defaults' window within DL system parameters has been updated to include new options which provide defaults for the account type and balance method. These are used when creating new customer accounts.

Note, the default account type does not include options for 'Buying Group' or 'Head Office' accounts.

DOCUMENTATION CHANGES

DL System Parameters – New Customer Defaults

global-dev:23 - P2 - System Parameters Company: A1 Period: 7/2005

File Run Settings Options Help

Defaults for New Customers of Company A1

Details

The values entered here are offered as defaults during the creation of new customer accounts.

If the customers account currency differs from the company base currency, the default credit limit is converted at the exchange rate in force on the date the customer is created.

Company Defaults

Default Credit Limit GBP

Sales Rep. is mandatory? Default Sales Rep. **AG**

Territory is mandatory? Default Territory **M01**

Class is mandatory? Default Class **R1**

Default for statements **Not required**

Account Defaults

Default customer type **Quotation**

Default balance method **Balance Forward**

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Partition 2 Computer 1D 14:51:12 dcp DL520B/WZ EC

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Note The following options apply to **all** companies rather than just the selected company. They are not used when creating accounts via any of the quick customer create options.

Default account type This is used to specify the default account type which is used when creating new accounts. The options are:

- Normal.
- Branch.
- Buying Group Member.
- Consumer.
- Quotation.

The account type cannot be defaulted to buying groups or head offices.

Default balance method This is used to specify the default balance method which is used when creating new accounts. The options are:

- Open item.
- Balance forward.
- As balance forward.

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